Holiday Barometer among Europeans, North Americans, Asians & Oceanians

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SCOPE OF THE SURVEY

15 COUNTRIES 15,000 INTERVIEWS



METHODOLOGY



Samples

In each country, the survey was conducted on a representative sample of each the population, aged 18 years and older, put together using the quota method (gender, age, profession) after stratification by region and by city size.



Timeline

The field studies were carried out between April 26th and May 16th 2022



Method of data collection

Online survey in the 15 countries





EUROP ASSISTANCE - RECAP OF MAIN KPIS

		EUROPE								•			-		
	Base: all	9000	1000	1 000	1 000	1 000	1000	1 000	1 000	1 000	1 000	1 000	1 000	1 001	1 000
europ	Know very well	5	4	2	10	3	4	5	4	6	4	6	4	4	9
assistance	Know a fair amount	13	9	4	26	8	13	17	11	10	9	7	5	7	22
	Know only by name	30	36	24	45	24	28	32	34	39	20	9	12	10	23
	Never heard of it	52	51	70	19	65	55	46	51	45	67	78	79	79	46
	TOTAL Know well	18	13	6	36	11	17	22	15	16	13	13	9	11	31
	TOTAL Know	48	49	30	81	35	45	54	49	55	33	22	21	21	54
Base: kr	now Europ Assistance	4 311	491	300	809	348	452	540	486	552	332	220	206	205	537
O europ	Very Favorable	10	7	6	12	12	8	8	11	9	8	21	15	19	15
assistance	TOTAL Favorable	51	39	35	62	39	43	56	50	42	55	64	45	60	66
	TOTAL Unfavorable	11	11	15	7	12	14	8	11	15	13	24	18	25	14
	Don't Know	38	50	50	31	49	43	36	39	43	32	12	37	15	20
												<i>୩₹</i>			
		europ assistance	europ assistance	europ assistance	europ assistance	europ	europ assistance	europ assistance	europ	europ assistance	europ assistance	GENERALI	europ assistance		europ assistance
	e: know the company	4 311	491	300	809	348	452	540	486	552	332	240	206	264	537
TOP 3 Ass	ociated Activities #1	Travel insurance	Travel insurance	Travel insurance	Travel medical assistance	Travel insurance	Travel insurance	Travel insurance	Travel insurance	Travel insurance	Travel insurance	Travel medical assistance	Travel insurance	Travel insurance	Travel medical assistance
	#2	Travel medical assistance	Travel medical assistance	Roadside assistance	Travel insurance	Travel medical assistance	Roadside assistance	Roadside assistance	Travel medical assistance	Roadside assistance	Travel medical assistance	Travel insurance	Travel medical assistance	Travel medical assistance	Travel insurance
	#3	Roadside assistance	Roadside assistance	Travel medical assistance	Roadside assistance	Roadside assistance	Travel medical assistance	Travel medical assistance	Roadside assistance	Travel medical assistance	Roadside assistance	Health	Health	Health	Health

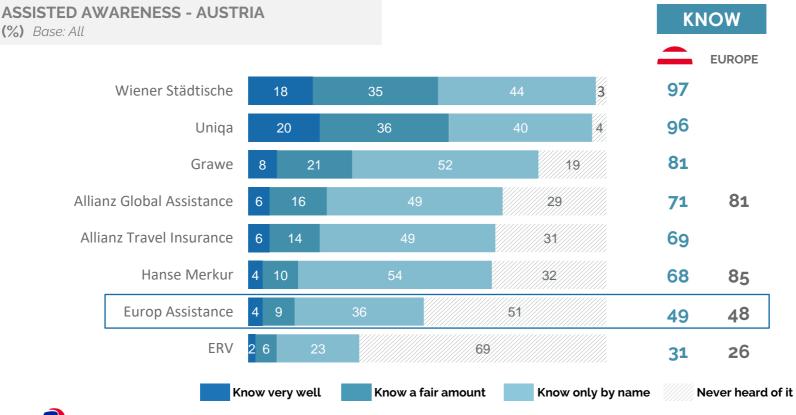
AUSTRIA

CHANGERS

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IN AUSTRIA, WIENER STÄDTISCHE AND UNIQA ARE KNOWN AT LEAST BY NAME BY ALMOST ALL CITIZENS. EUROP ASSISTANCE IS KNOWN BY HALF THE POPULATION





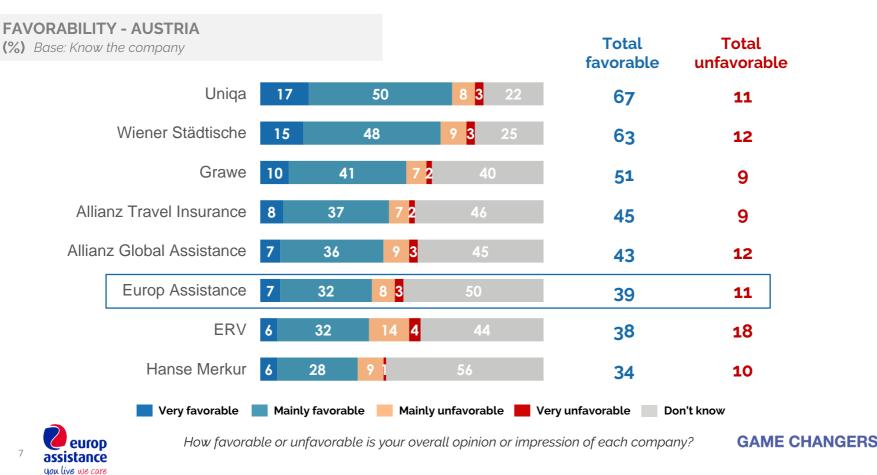


How well do you know each of the following insurance and/or assistance companies? Please consider all that you know or have heard of about each company





HALF OF THE RESPONDENTS THAT ARE AWARE OF EUROP ASSISTANCE DON'T HAVE AN OPINION ON THE COMPANY. IT IS PERCEIVED FAVORABLY BY 2 RESPONDENTS OUT OF 5





IN AUSTRIA, EUROP ASSISTANCE'S IMAGE ISN'T REALLY DEFINED. WIENER STÄDTISCHE AND UNIQA OUTPERFORM EA ON ALL THE DIMENSIONS

-> The statement "reliable" applies to Europ Assistance for 16% of Austrians aware of Europ Assistance

→ For the statement "reliable", Europ Assistance's score among Austrians is 27pts lower than Wiener Städtische's

DETAILED IMAGE - AUSTRIA

(%) Base: Know the company

Is a company... 💙 europ Allianz 🗢) ERV **W**GRAWE assistance UNIQA HanseMerkur 16 Reliable -16 -3 1 -27 -31 -4 = Available 16 1 -21 -26 -11 -5 -4 1 Caring -5 -1 -1 -24 -27 -15 -5 15 Worth the money 3 -18 -22 -7 1 -1 15 4 -26 -23 Customer-centric 14 -4 2 -14 -4 = 2 -19 -27 -7 -2 I would recommend 4 13 = -27 -2 -3 3 -19 -9 Easy to work with 12 =

How to read this slide?



8

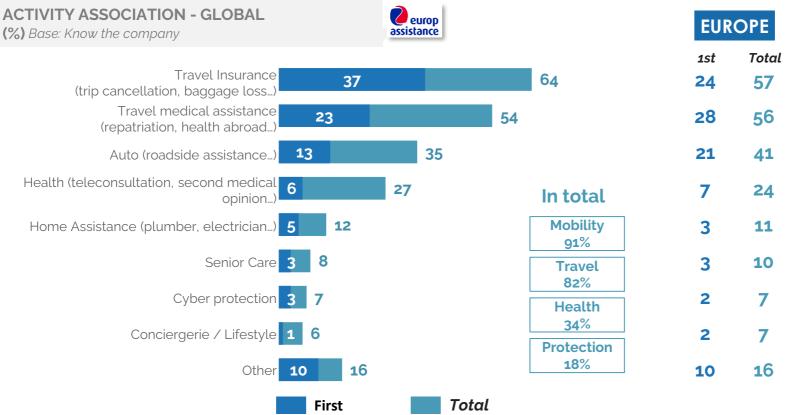
Those **attributes** were asked among as follows: "For each statement, select the companies you feel the statement applies to. You may choose as many companies as you want, or none at all"

GAME CHANGERS

Attributes were not rated company by company, but with the whole list of benchmark:

→This type of question allows to enlarge the benchmark but leads to lower positive percentages for each company.

EUROP ASSISTANCE IS MOSTLY ASSOCIATED WITH TRAVEL INSURANCE AND TRAVEL MEDICAL ASSISTANCE





You mentioned you knew Europ Assistance. Among the following categories, which one do you associate with Europ Assistance activity ?

GAME CHANGERS

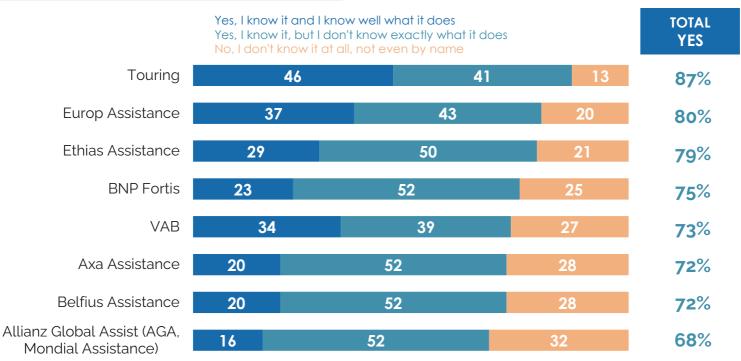
BELGIUM

lpsos

EUROP ASSISTANCE IS THE SECOND BEST-KNOWN INSURANCE COMPANY AMONG THE BELGIAN POPULATION, RIGHT BEHIND TOURING

ASSISTED AWARENESS - BELGIUM

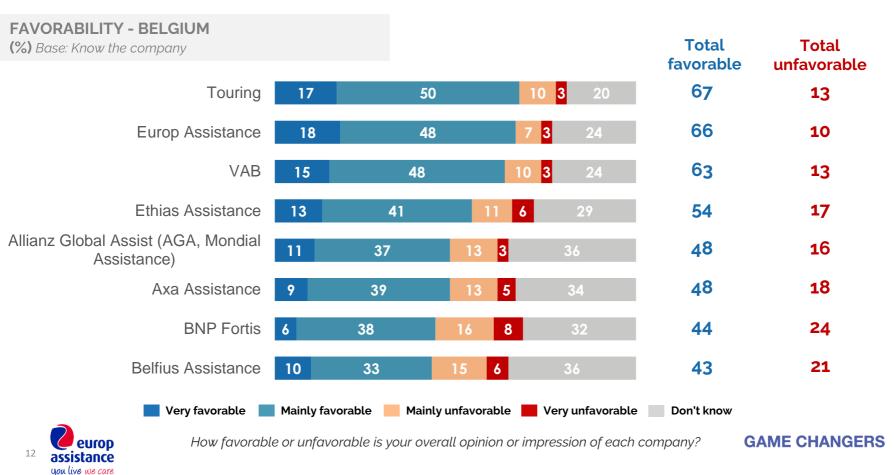
(%) Base: All







THE 3 COMPANIES WITH THE HIGHEST FAVORABILITY SCORES ARE TOURING, EUROP ASSISTANCE AND VAB, WITH SCORES FAIRLY CLOSE TO EACH OTHER



Ipsos

THE BELGIANS WHO KNOW EUROP ASSISTANCE HAVE THE IMAGE OF A RELIABLE AND AVAILABLE COMPANY. IT SYSTEMATICALLY OBTAINS HIGHER SCORES THAN ALLIANZ, AXA, BELFIUS AND BNP PARIBAS. ON THE OTHER HAND, IT IS ALMOST ALWAYS SLIGHTLY BELOW TOURING.

DETAILED IMAGE - BELGIUM

(%) Base: Know the company

ls

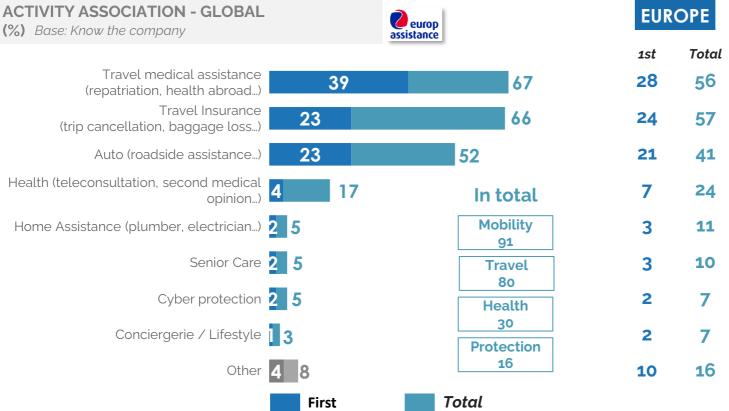
s a company	europ	Allianz ()) Clebal Austicance () MONDIAL ASSISTANCE	ASSISTANCE	TOURING	VAB	ethias E	Belfius B	NP PARIBAS FORTIS
Reliable	38	21	18	-3	4	7	16	18
Available	33	16	11	-5	=	4	11	12
Caring	28	15	11	-2	1	4	10	12
I would recommend	28	15	14	-1	4	6	13	14
Easy to work with	27	14	11	-4	1	3	9	11
Customer-centric	27	14	13	-1	1	4	11	13
Worth the money	23	12	9	-5	=	=	8	10



For each statement, select the companies you feel the statement applies to. You may choose as many companies as you want, or none at all.



BELGIANS MAINLY ASSOCIATE EUROP ASSISTANCE WITH TRAVEL MEDICAL ASSISTANCE AND TRAVEL INSURANCE. CAR INSURANCE COMES IN THIRD PLACE





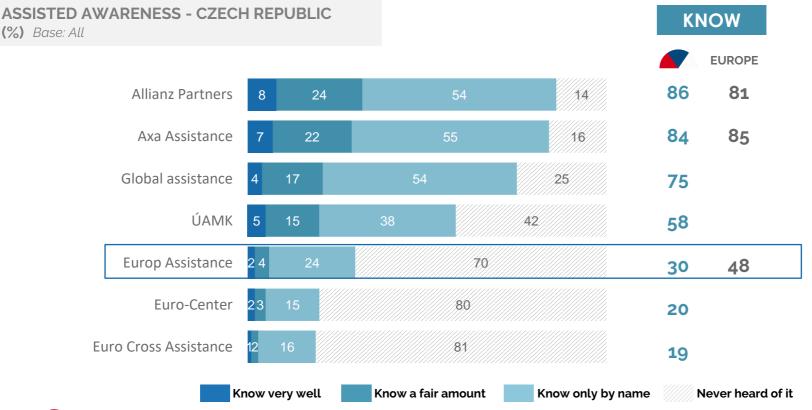
You mentioned you knew Europ Assistance. Among the following categories, which one do you associate with Europ Assistance activity ?

GAME CHANGERS

> CZECH REPUBLIC

 IN THE CZECH REPUBLIC, ALLIANZ PARTNERS AND AXA ARE THE BEST-KNOWN COMPANIES. EUROP ASSISTANCE IS KNOWN BY NEARLY 1/3 OF CITIZENS, BELOW THE EUROPEAN AVERAGE



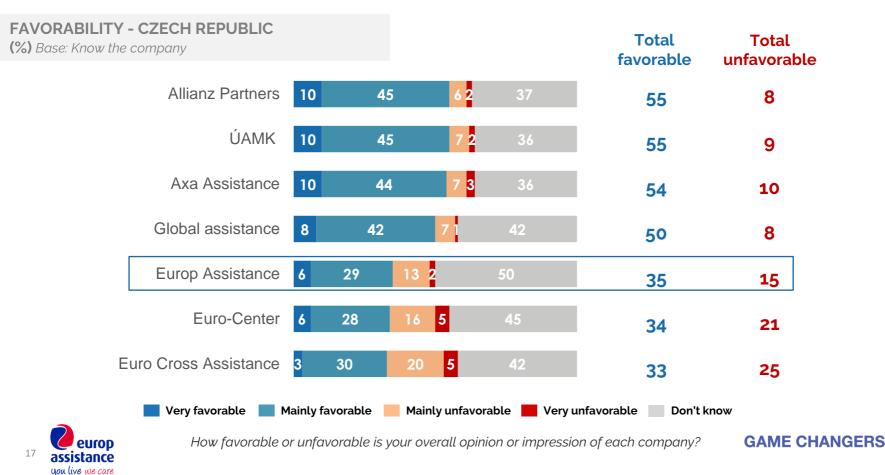




How well do you know each of the following insurance and/or assistance companies? Please consider all that you know or have heard of about each company



ONLY HALF OF THE CZECH CITIZENS WHO KNOW EUROP ASSISTANCE HAVE AN OPINION ON THE BRAND, WHICH IS MOSTLY FAVORABLE





ALLIANZ PARTNERS AND AXA ASSISTANCE HAVE THE MOST DEFINED IMAGE IN THE CZECH REPUBLIC. EUROP ASSISTANCE IS MAINLY CONSIDERED AS AVAILABLE

DETAILED IMAGE - CZECH REPUBLIC

(%) Base: Know the company

How to read this slide?

→ The statement "reliable" applies to Europ Assistance for 21% of Czechs aware of Europ Assistance.

→ For the statement "reliable", Europ Assistance's score among Czechs is 27pts lower than Allianz Partners'

ls a company	europ	Mallianz Partners	AXA	eurocross		global	UAMK
Available	21	-27	-23	9	8	-16	-17
Reliable	18	-29	-22	5	7	-15	-17
Caring	16	-22	-17	3	5	-13	-14
Customer-centric	16	-23	-18	5	7	-12	-12
Easy to work with	14	-25	-18	2	4	-8	-12
Worth the money	11	-26	-21	1	1	-13	-14
I would recommend	10	-27	-20	3	1	-13	-13



Those **attributes** were asked among as follows:

"For each statement, select the companies you feel the statement applies to. You may choose as many companies as you want, or none at all"

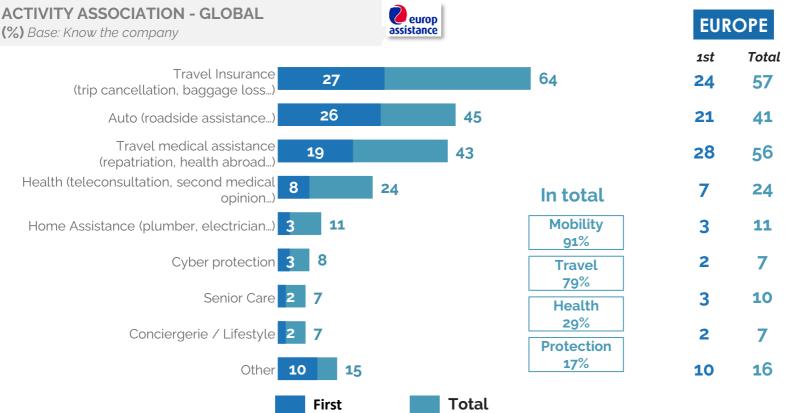
GAME CHANGERS

pso

Attributes were not rated company by company, but with the whole list of benchmark:

→This type of question allows to enlarge the benchmark but leads to lower positive percentages for each company.

EUROP ASSISTANCE IS MOSTLY ASSOCIATED WITH TRAVEL INSURANCE, AUTO INSURANCE AND TRAVEL MEDICAL ASSISTANCE





You mentioned you knew Europ Assistance. Among the following categories, which one do you associate with Europ Assistance activity ?

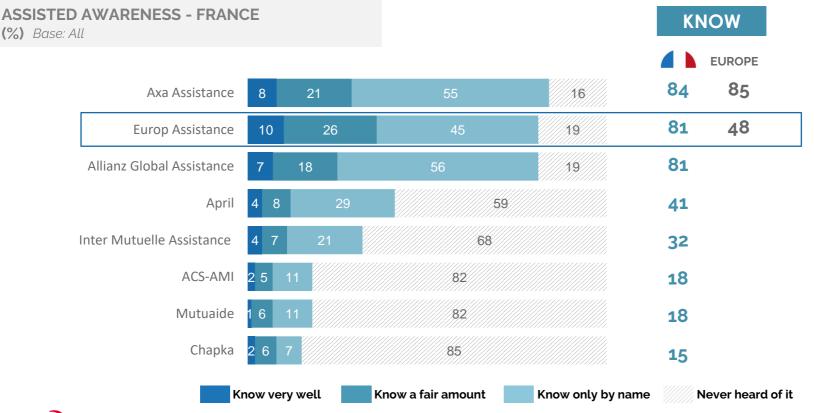


FRANCE

20

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IN FRANCE, EUROP ASSISTANCE IS AMONG THE BEST-KNOWN COMPANIES, WELL ABOVE THE EUROPEAN AVERAGE





How well do you know each of the following insurance and/or assistance companies? Please consider all that you know or have heard of about each company

GAME CHANGERS



EUROP ASSISTANCE RANKS AS THE COMPANY WITH THE MOST FAVORABLE OPINION, WAY ABOVE ITS COMPETITORS

FAVORABILITY - FRANCE Total Total (%) Base: Know the company favorable unfavorable Europ Assistance Axa Assistance Allianz Global Assistance Chapka Inter Mutuelle Assistance ACS-AMI Mutuaide April Very favorable Mainly favorable Mainly unfavorable Very unfavorable Don't know **GAME CHANGERS** How favorable or unfavorable is your overall opinion or impression of each company?

Base: Know the company

you live we care

RS Ipsos

EUROP ASSISTANCE'S IMAGE IS BETTER DEFINED IN FRANCE COMPARED TO THE OTHER MARKETS. IT IS MOSTLY CONSIDERED AS RELIABLE AND AVAILABLE

→ The statement "reliable" applies to Europ Assistance for 57% of the French aware of Europ Assistance.

→ For the statement "reliable", Europ Assistance's score among the French is 22pts higher than Allianz's

DETAILED IMAGE - FRANCE

(%) Base: Know the company

Allianz (il Is a company... europ 🥏 Chapka ODCIL assistance Reliable Available Customer-centric I would recommend Easy to work with Caring Worth the money

How to read this slide?



"For each statement, select the companies you feel the statement applies to. You may choose as many companies as you want, or none at all"

GAME CHANGERS

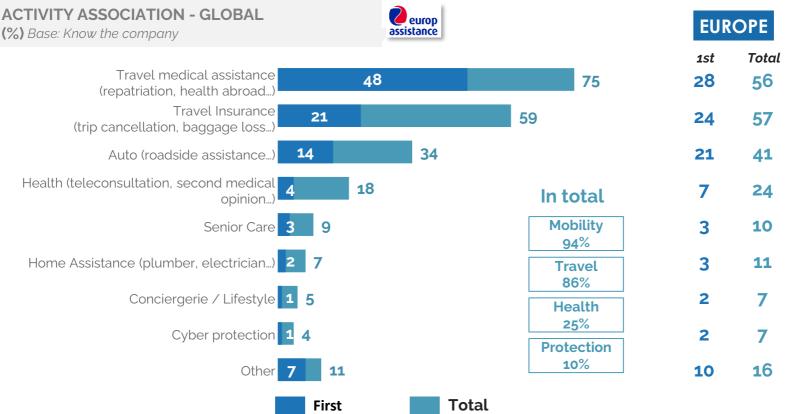
Attributes were not rated company by company, but with the whole list of benchmark:

Those attributes were asked among as follows:

→This type of question allows to enlarge the benchmark but leads to lower positive percentages for each company.



EUROP ASSISTANCE IS MOSTLY ASSOCIATED WITH TRAVEL MEDICAL ASSISTANCE, FOLLOWED BY TRAVEL INSURANCE





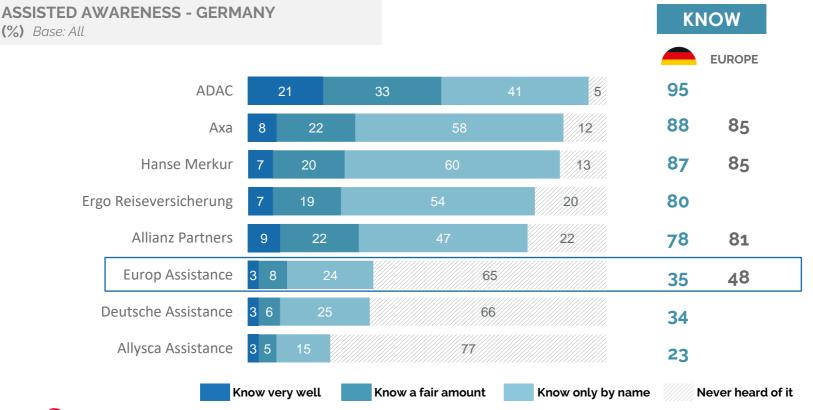
You mentioned you knew Europ Assistance. Among the following categories, which one do you associate with Europ Assistance activity ?

GAME CHANGERS

GERMANY

lpso

IN GERMANY, ADAC IS THE BEST-KNOWN COMPANY AMONG THE GENERAL POPULATION. EUROP ASSISTANCE IS AMONG THE LEAST, BELOW THE EUROPEAN AVERAGE



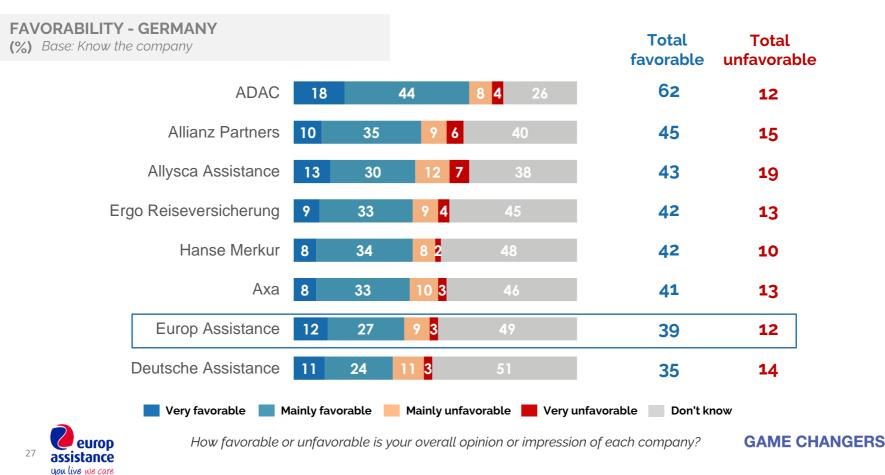


How well do you know each of the following insurance and/or assistance companies? Please consider all that you know or have heard of about each company

GAME CHANGERS



ONLY HALF OF THE RESPONDENTS WHO KNOW EUROP ASSISTANCE HAVE AN OPINION ON THE COMPANY, WHICH IS MOSTLY FAVORABLE





ADAC BENEFITS FROM THE MOST DEFINED IMAGE OF THE GERMAN MARKET. EUROP ASSISTANCE (IS MOSTLY ASSOCIATED TO ITS VALUE FOR MONEY

DETAILED IMAGE - GERMANY

(%) Base: Know the company

How to read this slide?

 \rightarrow The statement "Worth the money" applies to Europ Assistance for **15% of Germans aware of Europ Assistance**. \rightarrow For the statement "Worth the money", Europ Assistance's score among Germans is **9pts lower** than Allianz Partner's

ADAC Deutsche Assistance A Is a company... europ Allianz Partners assistance -lanseMerku ALLYSCA ASSISTANC Worth the money 15 -9 -3 -24 2 3 -5 -1 -8 -8 Available 14 -15 -35 2 -3 -12 -16 -3 -9 -34 -11 -9 Caring 14 4 -28 2 -8 Easy to work with -11 3 -5 -4 14 -26 -3 2 -5 I would recommend 13 -9 = -4 Customer-centric -15 -10 -32 4 -1 -12 -9 12 -22 -15 -42 2 -4 -17 -14 Reliable 10



"For each statement, select the companies you feel the statement applies to. You may choose as many companies as you want, or none at all"

Attributes were not rated company by company, but with the whole list of benchmark:

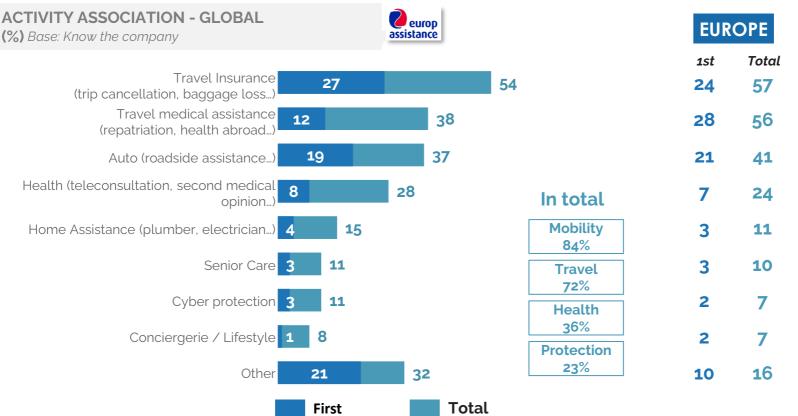
Those attributes were asked among as follows:

→This type of question allows to enlarge the benchmark but leads to lower positive percentages for each company.



EUROP ASSISTANCE IS MOSTLY ASSOCIATED TO TRAVEL INSURANCE.







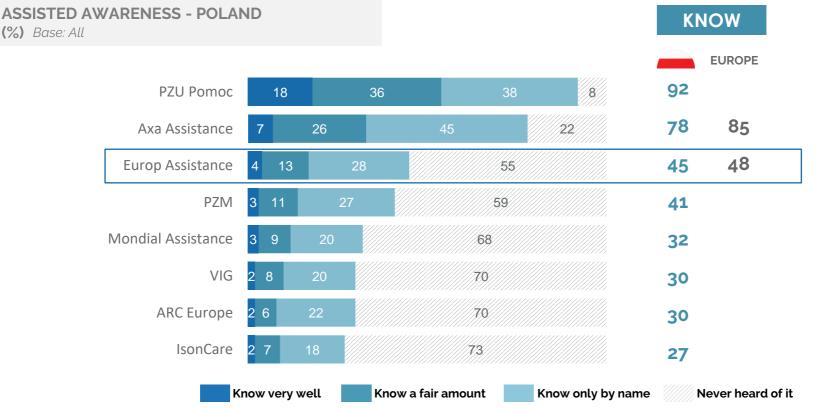
You mentioned you knew Europ Assistance. Among the following categories, which one do you associate with Europ Assistance activity ?



POLAND

CHANGERS

EUROP ASSISTANCE IS THE THIRD BEST-KNOWN COMPANY AMONG THE POLISH POPULATION, BUT FAR BEHIND PZU POMOC AND AXA



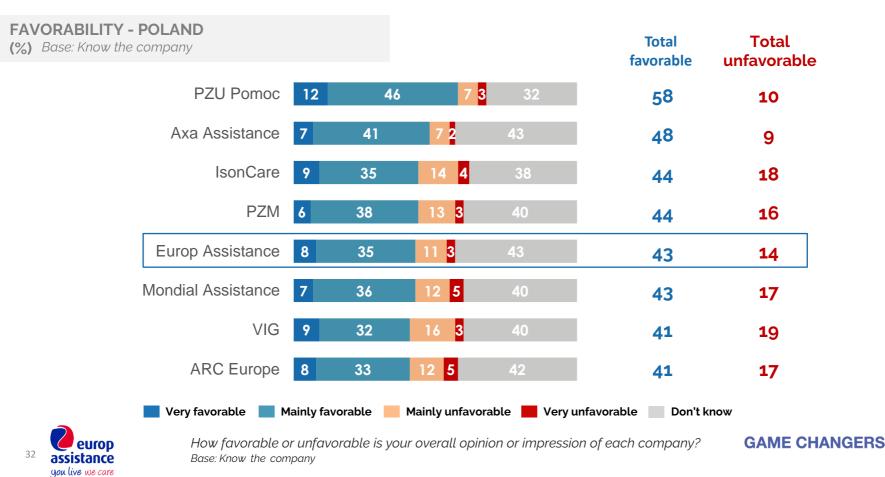


How well do you know each of the following insurance and/or assistance companies? Please consider all that you know or have heard of about each company





EUROP ASSISTANCE IS IN THE MIDDLE OF THE RANKING OF COMPANIES WITH THE MOST FAVORABLE OPINION





EUROP ASSISTANCE IS MOSTLY CONSIDERED AS CARING AND RELIABLE. PZU POMOC BENEFITS FROM THE MOST DEFINED IMAGE

DETAILED IMAGE - POLAND

(%) Base: Know the company

How to read this slide?

→ The statement "caring" applies to Europ Assistance for 22% of Poles aware of Europ Assistance.

→ For the statement "caring", Europ Assistance's score among Poles is **10pts lower** than Axa assistance's

Is a company		AXA	ARC .	IS <mark>©</mark> ∩				global
Caring	22	-10	5	8	6	7	-27	7
Reliable	20	-15	4	5	4	5	-38	4
Available	18	-15	1	2	2	2	-33	4
Worth the money	18	-11	4	4	5	5	-27	6
Easy to work with	17	-13	-1	5	2	4	-34	3
Customer-centric	17	-9	1	1	2	4	-29	3
I would recommend	15	-11	-1	4	=	4	-29	5



"For each statement, select the companies you feel the statement applies to. You may choose as many companies as you want, or none at all"

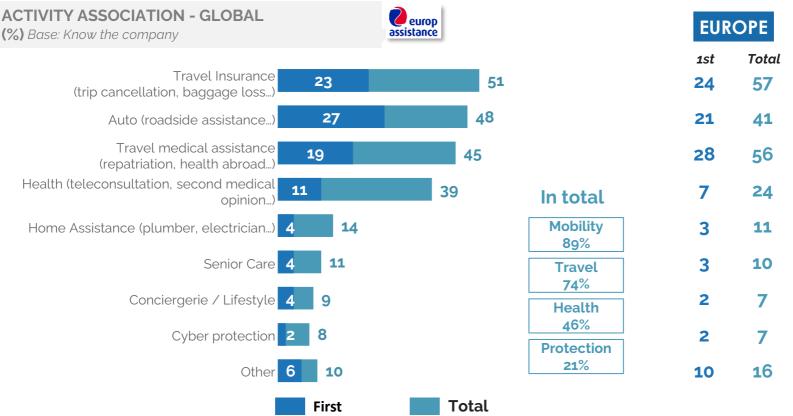


Attributes were not rated company by company, but with the whole list of benchmark:

Those **attributes** were asked among as follows:

→This type of question allows to enlarge the benchmark but leads to lower positive percentages for each company.

EUROP ASSISTANCE IS MOSTLY ASSOCIATED WITH TRAVEL INSURANCE, AUTO INSURANCE AND TRAVEL MEDICAL ASSISTANCE





You mentioned you knew Europ Assistance. Among the following categories, which one do you associate with Europ Assistance activity ?



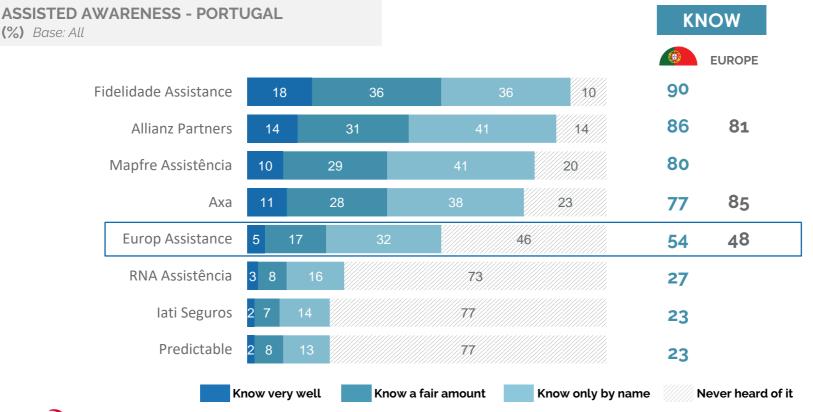




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FIDELIDADE ASSISTANCE AND ALLIANZ ARE THE BEST-KNOWN COMPANIES IN PORTUGAL. MID-TABLE, EUROP ASSISTANCE IS KNOWN BY HALF THE POPULATION.



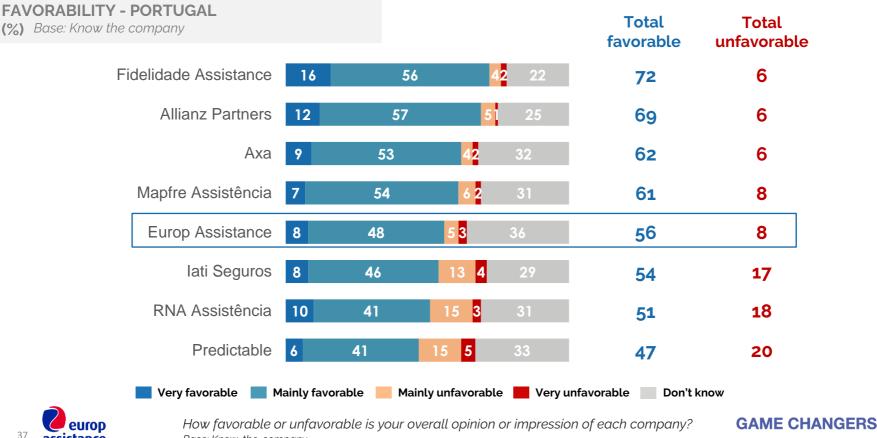


How well do you know each of the following insurance and/or assistance companies? Please consider all that you know or have heard of about each company

GAME CHANGERS



MORE THAN HALF OF THE RESPONDENTS WHO KNOW EUROP ASSISTANCE HAVE A FAVORABLE OPINION OF THE BRAND



Base: Know the company

you live we care



FIDELIDADE AND ALLIANZ PARTNERS HAVE THE MOST DEFINED IMAGE OF THE MARKET. EUROP ASSISTANCE IS MAINLY ASSOCIATED TO AN AVAILABLE COMPANY

DETAILED IMAGE - PORTUGAL

(%) Base: Know the company

How to read this slide?

→ The statement "available" applies to Europ Assistance for 25% of Portuguese aware of Europ Assistance.

→ For the statement "available", Europ Assistance's score among Portuguese is 15 pts lower than Allianz Partners'

ls a company		Allianz Partners	AXA	FIDELIDADE	iati	(P) MAPFRE ASISTENCIA	& PREDICTABLE	
Available	25	-15	-7	-27	12	-6	14	8
Reliable	20	-21	-12	-33	6	-9	8	6
Caring	19	-15	-6	-27	5	-5	11	7
Customer-centric	19	-13	-5	-24	6	-4	9	3
Easy to work with	17	-12	-6	-28	4	-6	8	5
I would recommend	16	-16	-6	-30	4	-6	10	3
Worth the money	15	-14	-5	-24	5	-4	10	4



Those **attributes** were asked among as follows:

"For each statement, select the companies you feel the statement applies to. You may choose as many companies as you want, or none at all"

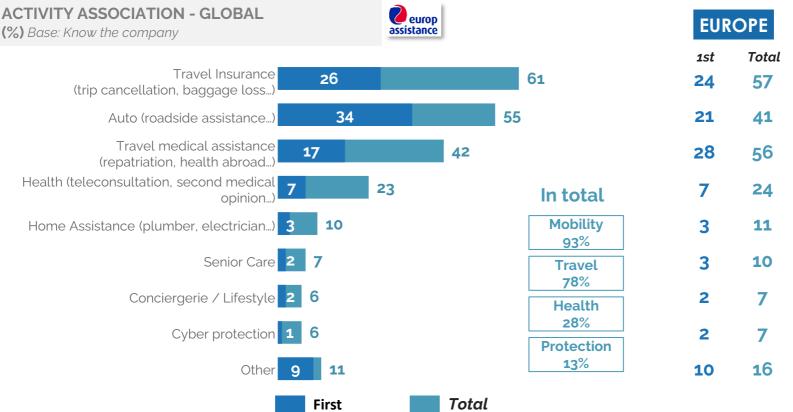


Attributes were not rated company by company, but with the whole list of benchmark:

→This type of question allows to enlarge the benchmark but leads to lower positive percentages for each company.

EUROP ASSISTANCE IS MOSTLY ASSOCIATED WITH TRAVEL INSURANCE AND AUTO INSURANCE







You mentioned you knew Europ Assistance. Among the following categories, which one do you associate with Europ Assistance activity ?



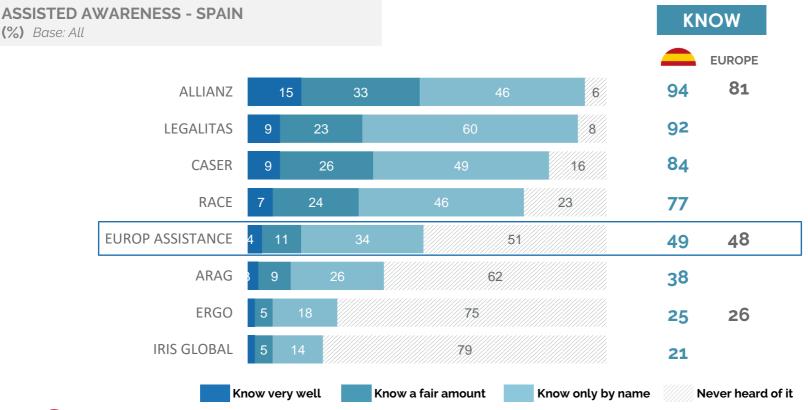




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ALLIANZ AND LEGALITAS ARE THE BEST-KNOWN COMPANIES IN SPAIN. MID-TABLE, EUROP ASSISTANCE IS KNOWN BY HALF THE POPULATION.

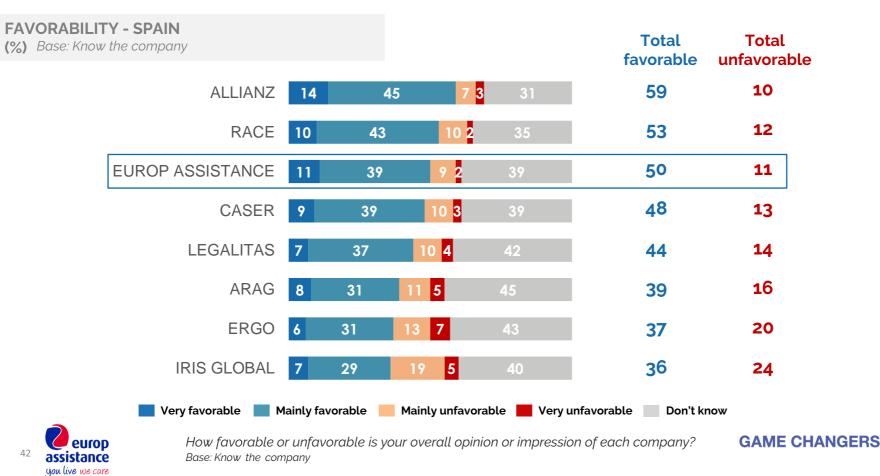




How well do you know each of the following insurance and/or assistance companies? Please consider all that you know or have heard of about each company



SPANIARDS' OPINION IN REGARDING EUROP ASSISTANCE IS FAVORABLE FOR HALF OF THE POPULATION





Ipsos

ALLIANZ HAS THE MOST DEFINED IMAGE IN SPAIN. EUROP ASSISTANCE IS MOSTLY CONSIDERED AS AVAILABLE AND RELIABLE



DETAILED IMAGE - SPAIN

(%) Base: Know the company

How to read this slide?

 \rightarrow The statement "available" applies to Europ Assistance for **28% of Spaniards aware of Europ Assistance**. \rightarrow For the statement "available", Europ Assistance's score among Spaniards is **19pts lower** than Allianz's

ls a company		Allianz 🅕	🥏) ERV	ARAG			LEGÁLITAS	
Available	28	-19	13	10	-6	11	-5	-3
Reliable	26	-19	16	11	=	20	2	-2
Caring	23	-15	12	12	1	13	1	-2
Customer-centric	20	-13	11	9	1	12	-1	-1
Easy to work with	19	-18	12	7	-4	9	-1	-2
Worth the money	18	-16	9	9	=	10	1	-1
I would recommend	18	-15	8	8	=	11	=	-2



"For each statement, select the companies you feel the statement applies to. You may choose as many companies as you want, or none at all"

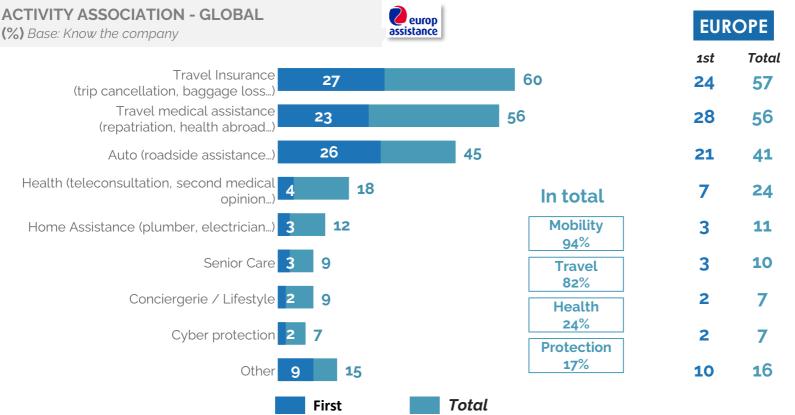
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Those **attributes** were asked among as follows:

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EUROP ASSISTANCE IS MOSTLY ASSOCIATED WITH TRAVEL INSURANCE AND TRAVEL MEDICAL ASSISTANCE





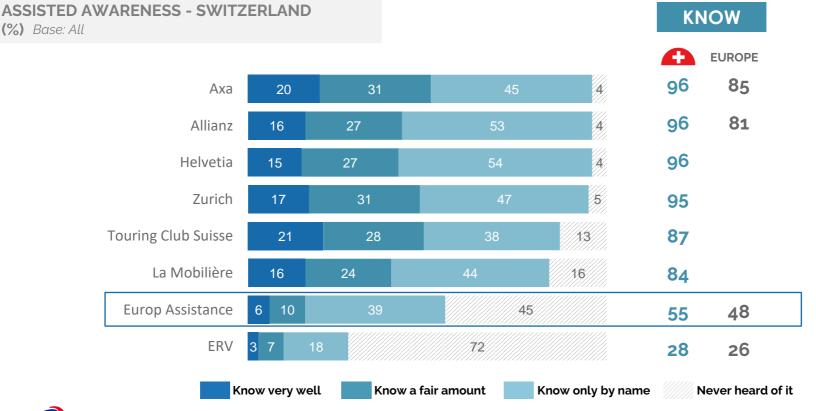
You mentioned you knew Europ Assistance. Among the following categories, which one do you associate with Europ Assistance activity ?



OSWITZERLAND

 KNOWN BY HALF THE SWISS POPULATION, EUROP ASSISTANCE IS HOWEVER AMONG THE LEAST-KNOWN COMPANIES, FAR BEHIND AXA, ALLIANZ AND HELVETIA





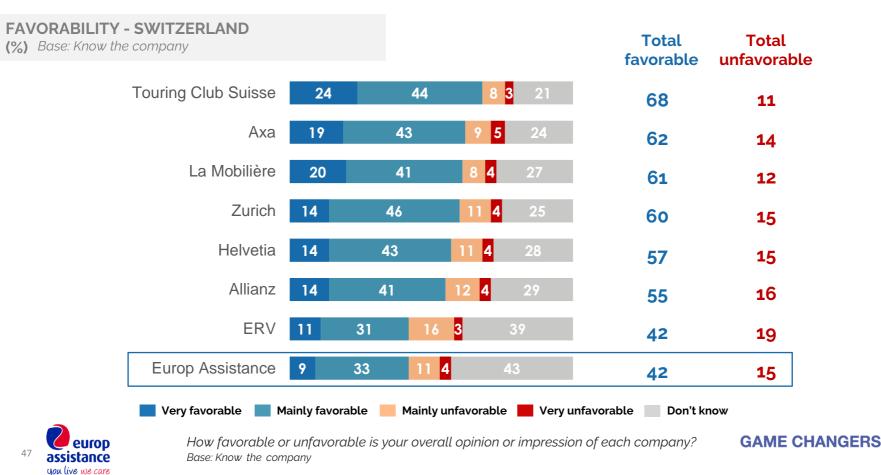


How well do you know each of the following insurance and/or assistance companies? Please consider all that you know or have heard of about each company

GAME CHANGERS



TOURING CLUB SUISSE HAS THE MOST FAVORABLE OPINION IN SWITZERLAND. EUROP ASSISTANCE IS AT THE BOTTOM OF THE RANKING





TOURING CLUB SUISSE, LA MOBILIÈRE AND AXA HAVE THE MOST DEFINED IMAGE IN THE SWISS MARKET

-> The statement "reliable" applies to Europ Assistance for 14% of the Swiss aware of Europ Assistance.

→ For the statement "reliable", Europ Assistance's score among the Swiss is **14pts lower** than Allianz's

DETAILED IMAGE - SWITZERLAND

How to read this slide?

(%) Base: Know the company

Ø Is a company... 🥭 europ TS Serv helvetia 🛦 la Mobilière Allianz (11) assistance ZURICH Reliable -16 -28 14 -14 -24 -2 -24 -22 Available 14 -13 -21 -1 -10 -20 -25 -16 -18 12 -21 Caring -11 -1 -10 -24 -17 -8 Customer-centric -18 12 -5 -9 -19 -22 -13 I would recommend 11 -9 -20 -2 -10 -21 -23 -15 Easy to work with 10 -10 -19 -9 -19 -22 -13 -4 -6 Worth the money 8 -12 -20 -11 -20 -25 -15



"For each statement, select the companies you feel the statement applies to. You may choose as many companies as you want, or none at all"

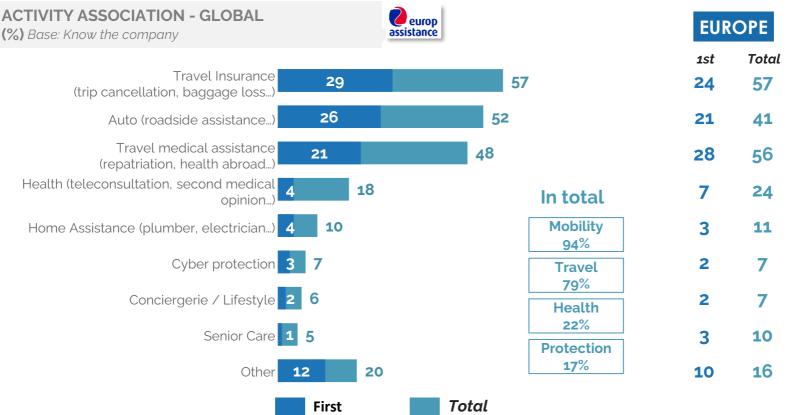
GAME CHANGERS

Attributes were not rated company by company, but with the whole list of benchmark:

Those attributes were asked among as follows:

→This type of question allows to enlarge the benchmark but leads to lower positive percentages for each company.

EUROP ASSISTANCE IS MOSTLY ASSOCIATED WITH TRAVEL INSURANCE, AUTO ASSISTANCE AND TRAVEL MEDICAL ASSISTANCE





You mentioned you knew Europ Assistance. Among the following categories, which one do you associate with Europ Assistance activity ?

GAME CHANGERS

UNITED KINGDOM

 IN THE UK, AXA AND ALLIANZ ARE THE BEST-KNOWN COMPANIES. EUROP ASSISTANCE IS AMONG THE LEAST KNOWN, 15 POINTS BELOW THE EUROPEAN AVERAGE



ASSISTED AWARENESS - UK KNOW (%) Base: All EUROPE 85 85 Axa 10 15 81 75 Allianz 6 20 25 62 Abta 23 38 Trailfinders 58 42 4 Europ Assistance 67 48 33 4 Coverwise 71 4 29 3 7 Cedar Tree 80 20 Know very well Know a fair amount Know only by name Never heard of it

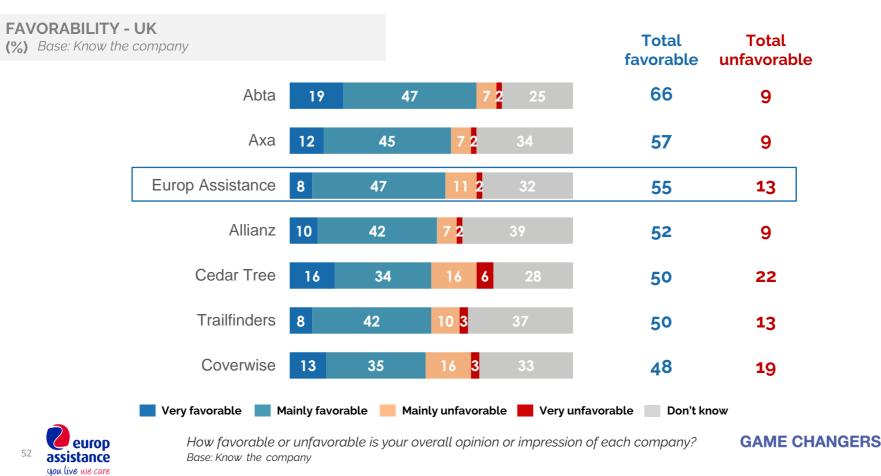


How well do you know each of the following insurance and/or assistance companies? Please consider all that you know or have heard of about each company

GAME CHANGERS



EUROP ASSISTANCE RANKS 3RD AMONG THE COMPANIES WITH THE MOST FAVORABLE IMAGE, JUST AFTER ABTA AND AXA





IN THE UK, EUROP ASSISTANCE IS MOSTLY CONSIDERED AS AVAILABLE AND RELIABLE

→ The statement "available" applies to Europ Assistance for 27% of Britons aware of Europ Assistance.

→ For the statement "available", Europ Assistance's score among Britons is 15pts lower than Allianz's

How to read this slide?



DETAILED IMAGE - UK

(%) Base: Know the company

Is a company... BABTA Acedartree coverwise TRAILFINDERS europ Allianz (II) assistance 27 -22 -17 Available -15 5 -7 = 24 -12 -23 -21 Reliable 1 -1 -4 -6 20 Worth the money -14 -15 -5 -3 = 20 Easy to work with -14 -13 -3 -2 -4 = 18 -6 -3 -12 -13 -1 0 Caring 16 Customer-centric -5 -12 -13 -4 -3 -7 I would recommend 15 -16 -6 -3 -9 -17 -5



Those **attributes** were asked among as follows:

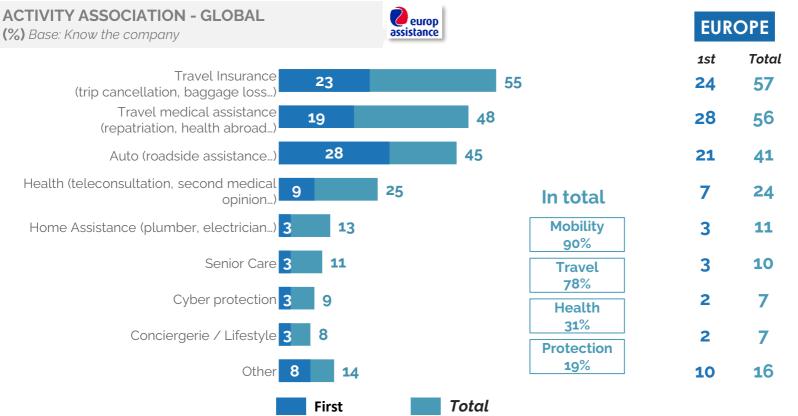
"For each statement, select the companies you feel the statement applies to. You may choose as many companies as you want, or none at all"

Attributes were not rated company by company, but with the whole list of benchmark:

→This type of question allows to enlarge the benchmark but leads to lower positive percentages for each company.



EUROP ASSISTANCE IS MOSTLY ASSOCIATED WITH TRAVEL INSURANCE AND TRAVEL MEDICAL ASSISTANCE





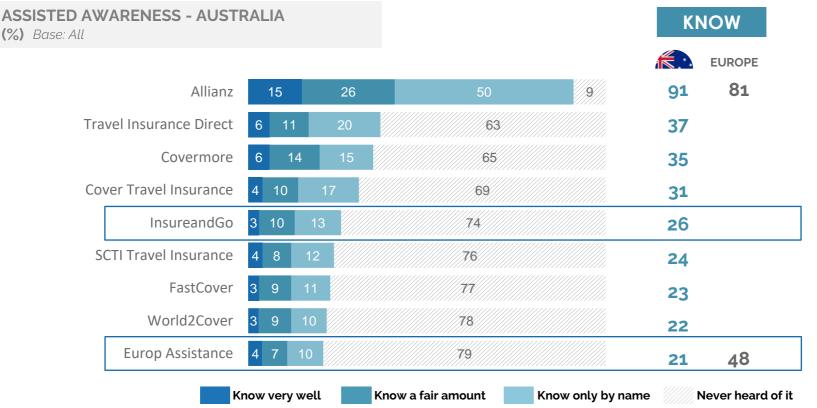
You mentioned you knew Europ Assistance. Among the following categories, which one do you associate with Europ Assistance activity ?

GAME CHANGERS





IN AUSTRALIA, ALLIANZ IS THE ONLY WELL-KNOWN INSURANCE COMPANY, BY FAR. INSUREANDGO AND EUROPE ASSISTANCE ARE KNOWN BY MORE THAN 1 CITIZEN OUT OF FIVE



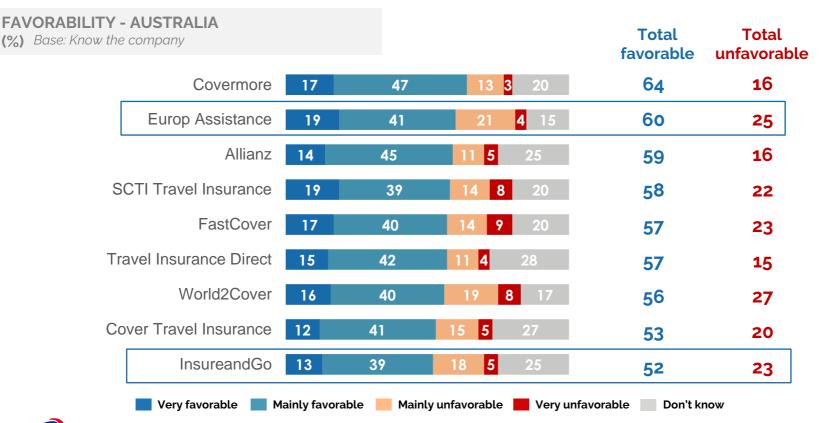


How well do you know each of the following insurance and/or assistance companies? Please consider all that you know or have heard of about each company

GAME CHANGERS



EUROP ASSISTANCE BENEFITS FROM A VERY FAVORABLE OPINION IN AUSTRALIA. HOWEVER, INSUREANDGO IS AT THE BOTTOM OF THE RANKING





How favorable or unfavorable is your overall opinion or impression of each company? Base: Know the company



EUROP ASSISTANCE'S IMAGE IS MORE DEFINED THAN INSUREANDGO'S IN AUSTRALIA. IT IS MOSTLY CONSIDERED AS AVAILABLE AND RELIABLE

-> The statement "available" applies to InsureandGo for 27% of Australians aware of InsureandGo.

-> For the statement "available", InsureandGo's score among Australians is 38pts lower than Europ Assistance's

How to read this slide?



DETAILED IMAGE - AUSTRALIA

(%) Base: Know the company

Is a company... europ Cover Travel Cover-More fastcover TRAVEL INSURAT DEFET Allianz (II) (INSUREANDGO Southern Cross assistance Insurance Travel Insurance Available -38 27 2 -16 5 5 -3 10 8 Reliable 6 22 -35 2 -12 5 -1 4 = Easy to work with 3 -3 19 -27 -14 1 3 -5 3 Worth the money 18 2 -23 3 -9 5 5 3 = Caring 16 -7 -3 -25 3 1 -1 4 4 Customer-centric 16 -24 1 -10 -1 1 -3 -1 = I would recommend 16 -26 2 1 -3 4 -15 1 -4



Those **attributes** were asked among as follows:

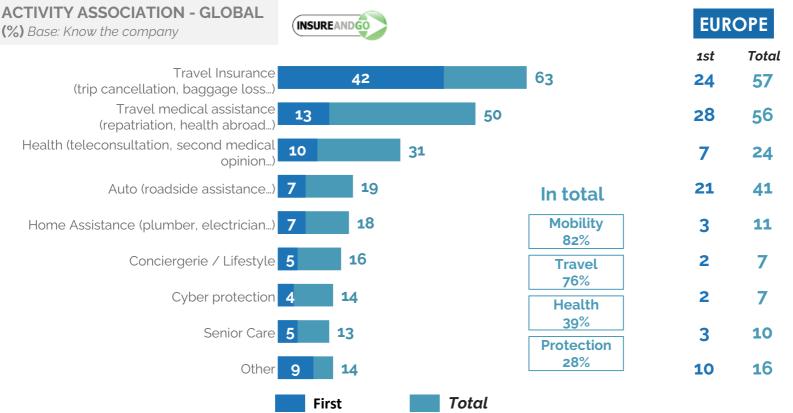
"For each statement, select the companies you feel the statement applies to. You may choose as many companies as you want, or none at all"

GAME CHANGERS

Attributes were not rated company by company, but with the whole list of benchmark:

→This type of question allows to enlarge the benchmark but leads to lower positive percentages for each company.

INSUREANDGO IS MOSTLY ASSOCIATED WITH TRAVEL INSURANCE AND TRAVEL MEDICAL ASSISTANCE





You mentioned you knew InsureandGo. Among the following categories, which one do you associate with InsureandGo activity ?



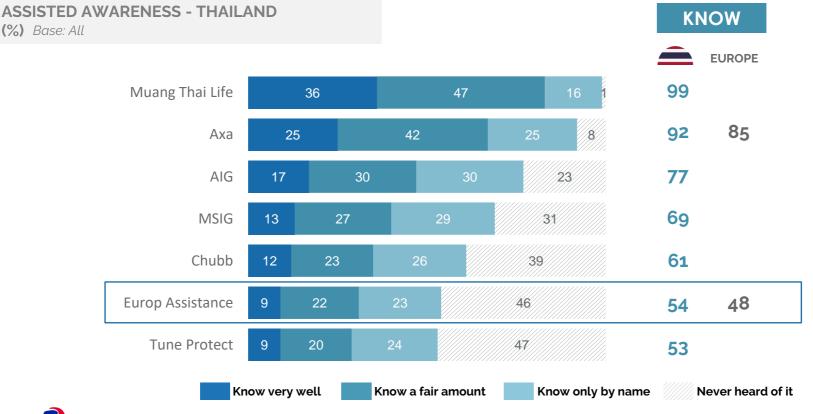


OTHAILAND

CHANGERS

MUANG THAI LIFE AND AXA ARE THE BEST-KNOWN COMPANIES AMONG THE THAI POPULATION. DESPITE BEING KNOWN BY 1 CITIZEN OUT OF 2, EUROP ASSISTANCE IS ONE OF THE LEAST

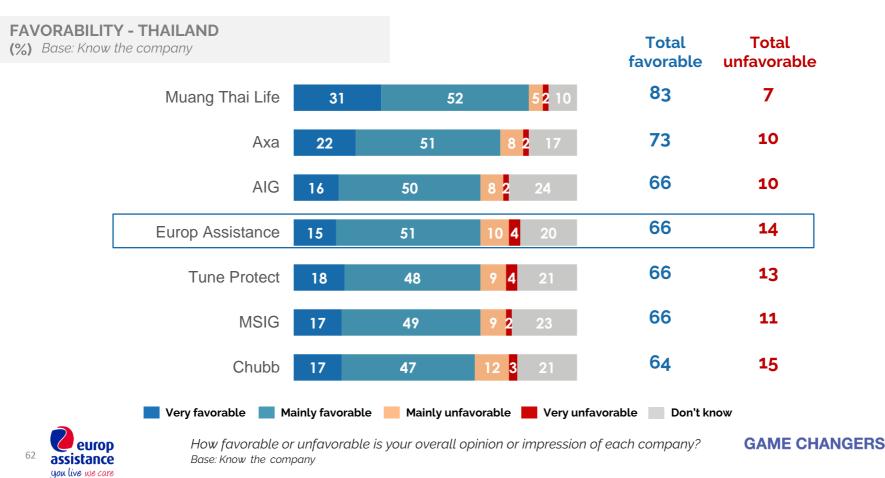






How well do you know each of the following insurance and/or assistance companies? Please consider all that you know or have heard of about each company







IN TERMS OF IMAGE, MTL OUTPERFORMS THE THAI MARKET

DETAILED IMAGE - THAILAND

(%) Base: Know the company

ID How to read this slide? → The statement "reliable" applies to Europ Assistance for 23% of Thaïs aware of Europ Assistance. → For the statement "reliable", Europ Assistance's score among Thaïs is 24pts lower than Axa's

ls a company		AXA	AIG	снивв.	MSIG		Tune Protect
Reliable	23	-24	-11	-4	-4	-45	=
Available	22	-22	-8	-1	-6	-43	=
Caring	21	-21	-7	-3	-3	-43	=
Worth the money	21	-20	-3	-1	3	-40	3
Customer-centric	20	-19	-6	-3	-2	-39	=
I would recommend	17	-19	-8	-4	-4	-43	=
Easy to work with	16	-23	-9	-4	-6	-43	-5



Those **attributes** were asked among as follows:

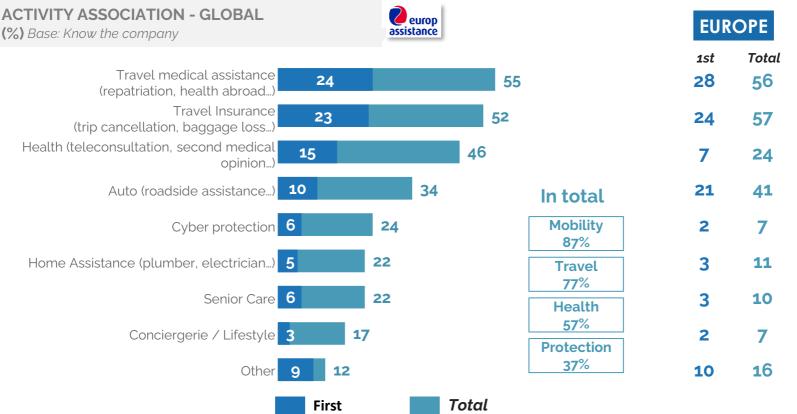
"For each statement, select the companies you feel the statement applies to. You may choose as many companies as you want, or none at all"

Attributes were not rated company by company, but with the whole list of benchmark:

→This type of question allows to enlarge the benchmark but leads to lower positive percentages for each company.



EUROP ASSISTANCE IS MOSTLY ASSOCIATED WITH TRAVEL MEDICAL ASSISTANCE AND TRAVEL INSURANCE





You mentioned you knew Europ Assistance. Among the following categories, which one do you associate with Europ Assistance activity ? Base: Know Europ Assistance (in the U.S.: Generali Travel Insurance ; in Australia: ERV)





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CHANGERS

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IN THE USA, INSURANCE COMPANIES ARE VERY LITTLE KNOWN. GENERALI TRAVEL INSURANCE, GENERALI GLOBAL ASSISTANCE AND EUROP ASSISTANCE ARE KNOWN BY ABOUT 1 CITIZEN OUT OF 5



ASSISTED (%) Base: A	AWARENESS - USA						K	WOW
								EUROPE
	Allianz Travel Insurance	7	12	15	66		34	81
	AIG TravelGuard	8	10	15	67		33	
	Trip Mate	6	8	11	75		25	
	Аха	5	9	10	76		24	85
G	Generali Travel Insurance	5	8	11	76		24	
Ge	enerali Global Assistance	5	9	9	77		23	
	International SOS	6	8	9	77		23	
	Europ Assistance	6	7	9	78		22	48
	GMMI	6	8	7	79		21	
	World Nomads	4	9 8	8	79		21	
	Seven Corners	4	8 9)	79		21	
	Arch RoamRight	6	7 6		81		19	
Know very well K					Know a fair amount	Know only by name		Never heard of it



How well do you know each of the following insurance and/or assistance companies? Please consider all that you know or have heard of about each company





GENERALI GLOBAL ASSISTANCE AND EUROP ASSISTANCE BOTH RANKED AS THE FOURTH MOST **FAVORABLE COMPANIES**



FAVORA (%)	ABILITY - USA				Total favorable	Total unfavorable
	Arch RoamRight	33	35	19 5 8	68	24
	World Nomads	27	40	14 8 11	67	22
	AIG TravelGuard	25	40	13 <mark>4</mark> 18	65	17
	Generali Global Assistance	23	41	19 6 11	64	25
	Europ Assistance	21	43	17 7 12	64	24
	Allianz Travel Insurance	20	44	13 5 18	64	18
	Аха	26	36	17 6 15	62	23
	Trip Mate	25	37	20 5 13	62	25
	Generali Travel Insurance	24	37	16 <mark>5</mark> 18	61	21
	Seven Corners	23	37	21 6 13	60	27
	International SOS	18	42	16 8 16	60	24
	GMMI	26	32	22 9 11	58	31



How favorable or unfavorable is your overall opinion or impression of each company? Base: Know the company





AIG AND ALLIANZ TRAVEL HAVE THE MOST DEFINED IMAGE OF THE US MARKET. THE OTHER COMPETITORS ARE NECK TO NECK



DETAILED IMAGE - USA

(%) Base: Know the company

How to read this slide?

→ The statement "available" applies to Generali Travel Insurance for 25% of Americans aware of Generali Travel Insurance.

→ For the statement "available", Generali Travel Insurance's score among Americans is 13pts lower than AIG's

ls a company	GENERALI CLORAL ASSISTANCE Travel insurance		AIG Travel Guard	Allianz Travel	☆Arch Roam Right,	AXA	GENERALI GLOBAL Assistance	gmmi	INTERNATIONAL	SEVEN CORNERS	TripMate	World Nomads
Available	25	3	-13	-15	6	=	4	8	7	4	-1	7
Caring	22	-2	-9	-11	4	4	-3	8	6	2	-8	2
Reliable	20	=	-18	-20	1	-3	-6	6	=	-1	-6	-2
Easy to work with	20	4	-13	-15	3	0	1	4	-2	1	-8	-3
I would recommend	20	2	-11	-16	3	3	20	2	-2	4	-4	3
Worth the money	18	-3	-15	-15	-1	-3	-1	3	=	3	-7	1
Customer-centric	18	-2	-10	-17	-4	-2	-1	4	-1	-2	-4	-3



"For each statement, select the companies you feel the statement applies to. You may choose as many companies as you want, or none at all"



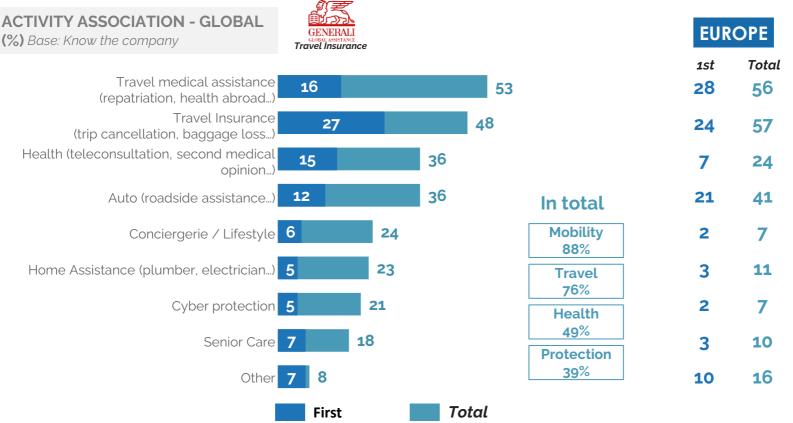


Attributes were not rated company by company, but with the whole list of benchmark:

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GENERALI TRAVEL INSURANCE IS MOSTLY ASSOCIATED WITH TRAVEL MEDICAL ASSISTANCE AND





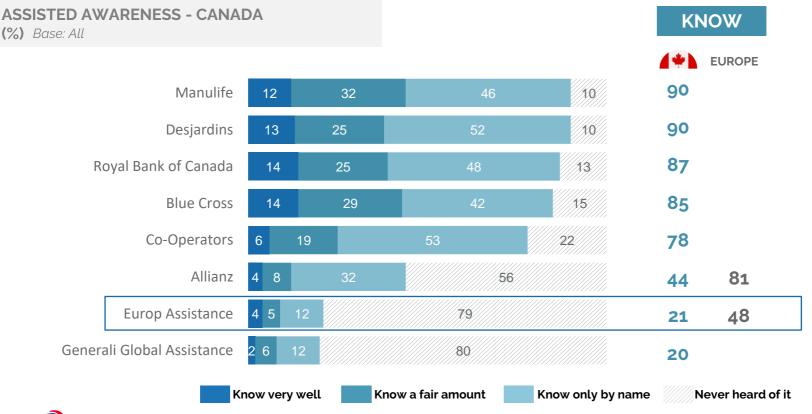
You mentioned you knew Generali Travel Insurance. Among the following categories, which one do you associate with Generali Travel Insurance activity ?











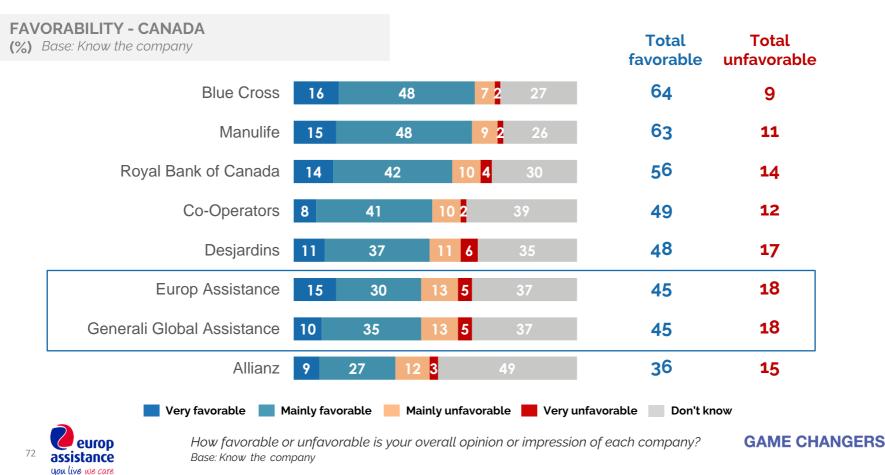


How well do you know each of the following insurance and/or assistance companies? Please consider all that you know or have heard of about each company





45% OF THE CANADIANS HAVE A FAVORABLE OPINION OF GENERALI GLOBAL ASSISTANCE AND EUROP ASSISTANCE





BLUE CROSS AND MANULIFE ARE DOMINATING THE MARKET IN TERMS OF IMAGE.



DETAILED IMAGE - CANADA

(%) Base: Know the company

How to read this slide?

→ The statement "Caring" applies to Europ Assistance for **13% of Canadians aware of Europ Assistance**. → For the statement "Caring", Europ Assistance's score among Canadians is **20pts lower** than Blue Cross's

ls a company	europ assistance	Allianz 🕕		≫ co-operators	O Desjardins	GENERALI GLOBAL ASSISTANCE	👭 Manulife	RBC
Caring	13	1	-20	-7	-9	2	-15	-12
Reliable	12	-4	-33	-15	-17	-1	-31	-24
Available	12	-11	-35	-21	-26	-3	-35	-30
Easy to work with	12	=	-22	-6	-13	2	-22	-14
Worth the money	11	-1	-22	-6	-10	1	-19	-13
Customer-centric	9	-2	-22	-10	-12	-4	-18	-14
I would recommend	7	-3	-28	-10	-15	-4	-24	-18



Those **attributes** were asked among as follows:

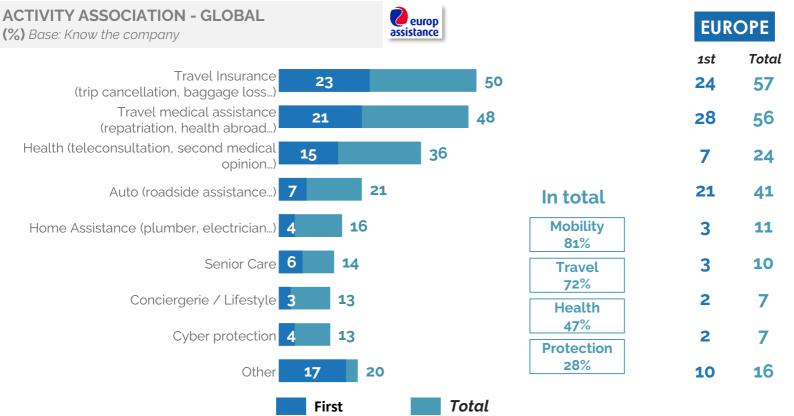
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EUROP ASSISTANCE IS MOSTLY ASSOCIATED WITH TRAVEL INSURANCE AND TRAVEL MEDICAL ASSISTANCE





You mentioned you knew Europ Assistance. Among the following categories, which one do you associate with Europ Assistance activity ?

GAME CHANGERS

End of document

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HANGERS

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This project has been designed according to Ipsos Quality standards. It was reviewed and approved by: *Guillaume Petit, Service Line Leader*



OUR COMMITMENT



Professional codes, quality certification and data protection

Ipsos is a member of the following French and European professional Market Research and Opinion bodies:

- SYNTEC (<u>www.syntec-etudes.com</u>), French Union of Market Research companies
- ESOMAR (<u>www.esomar.org</u>) the European Society for Opinion and Market Research

Ipsos France is consequently committed to applying **the ICC/ESOMAR code** for opinion and market research. This code of conduct defines the ethical rules for Market Research professionals and sets out the protection offered to participants.

Ipsos France complies with the applicable laws. Ipsos has appointed a Data Protection Officer and has implemented a compliance plan to GDPR (Règlement (UE) 2016/679). For more information about the Ipsos Data Protection & Privacy Policy relative to personal data : https://www.ipsos.com/en/privacy-data-protection

The retention period applicable to interviewees' personal data be as follows, unless otherwise agreed with the client :

• 12 months upon Ad Hoc Study completion

afaq

• 3 years upon each wave completion of a Continuous Study.

Ipsos France has received ISO 20252: 2012 certification by AFNOR CERTIFICATION

- This document was drawn up in accordance with these international Codes and Quality standards. The technical elements relative to the execution of the project are described in methodological approach or survey overview in the report.
- This project was carried out in accordance with these international Codes and Quality standards

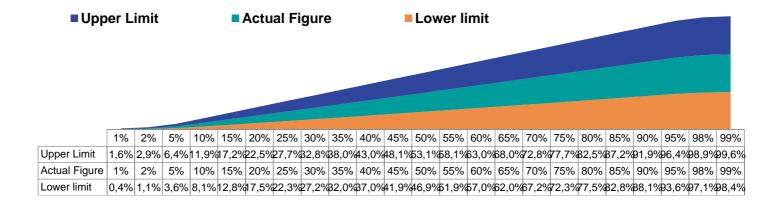


RELIABILITY OF RESULTS SPREADSHEET

In this instance, with regard to this study:

- Confidence interval: 95%
- Size of sample: 1000

The proportions observed are between :





SURVEY OVERVIEW

CAWI survey - Online panel



- SAMPLE
- Target : Male/female aged 18 y.o and older
- Selection of the respondent : participant selection using a quota method
- Sample representativeness : gender, age, occupation, region, city size



DATA COLLECTION

- Fieldwork dates : 26 April -15 May
- **Sample achieved : 15000** interviews
- Data collection : online
- Loyalty program with points- based award system for panelists
- Response quality control methods: monitoring of participants' response behaviour (identification of responses that are too quick or careless, e.g. ticked in a straight or zigzag line)
- Checking of IP and consistency of demographic data.



DATA PROCESSING

- Weighted sample
- Method used: Rim Weighting Method
- Weighting criteria: gender, age, region, occupation



RELIABILITY OF RESULTS : SELF COMPLETION ONLINE SURVEYS IIS

To ensure the overall reliability of a survey, all possible error components must be taken into account. That is why lpsos imposes strict controls and procedures at each stage of the survey process.

UPSTREAM OF THE DATA COLLECTION

- **Sample :** structure and representativeness
- Questionnaire : the questionnaire is worded by following an editing process with 12 compulsory standards. It is proofread and approved at a senior level and then sent to the client for final validation. The programming (or questionnaire script) is tested by at least 2 people and validated.
- Data collection : the interviewers are trained in survey techniques through a dedicated training module prior to any participation in a survey. In addition, they receive or attend a detailed briefing at the start of each survey.

DURING THE DATA COLLECTION

Sampling : Ipsos imposes very strict operating rules for its selection frame in order to maximize the random nature of the sample selection : random selection from telephone listings, quota method, etc. Fieldwork monitoring : collection is monitored and checked (exclusive link, IP validation, panelists' behavior monitoring penetration, interview length, consistency of responses, participation rate, number of reminders, etc.)

DOWNSTREAM OF THE DATA COLLECTION

- The results are analyzed in accordance with the statistical analysis methods (confidence interval versus sample size, significance tests). The first results are systematically checked against the raw results from the data collection. The consistency of results is also checked (particularly the results observed versus comparison sources in our possession).
- In cases where sample weighting is used (margin calibration method), this is checked by the processing teams (DP) and then validated by the survey teams.



SURVEY OVERVIEW

Organization (CAWI survey - Online panel)



ACTIVITIES CARRIED OUT OR COORDINATED BY IPSOS TEAMS IN FRANCE

- Design and methodology
- Conception and design of questionnaire/ validation of scripting
- Coordination and validation of translation
- Coordination of data collection
- Data processing
- Validation of the statistical analyses
- Creation of survey report
- Results presentation design
- Formatting of results
- Oral presentation Analyses and summary



- Translation
- Scripting
- Sampling (IIS panel)
- Emailing
- Data collection
- Data Map



ABOUT IPSOS

Ipsos is the world's third largest market research company, present in 90 markets and employing more than 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP www.ipsos.com

GAME CHANGERS

In our world of rapid change, the need of reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth: You act better when you are sure.

